# 35.1.4 FMS Application Operations Tools

**Contents:**

1.0 Purpose
2.0 Introduction
3.0 AM Request Tracking Database
4.0 Known Limitations and Workarounds
5.0 Process Integration
Appendix A – Tool Selection Requirements
Appendix B – Help Desk Software Comparison Matrix

## 1.0 Purpose

The purpose of this document is to describe the short term approach for using help desk software to capture and manage user requests within the Tier II Applications Management (AM) group. It provides the rationale behind selecting an MS Access database as a short term solution for the AM group and a brief description of some of the features that it includes.

## 2.0 Introduction

The Request Management process defines the steps to take a user request from an initial state of awareness to a final state of resolution. This process is challenging without the use of a specially designed software tool to track and manage user requests. This tool is commonly referred to as help desk software. The remainder of this document will describe the help desk software that will be used by the AM group and the rationale for selecting it as the short term tool of choice.

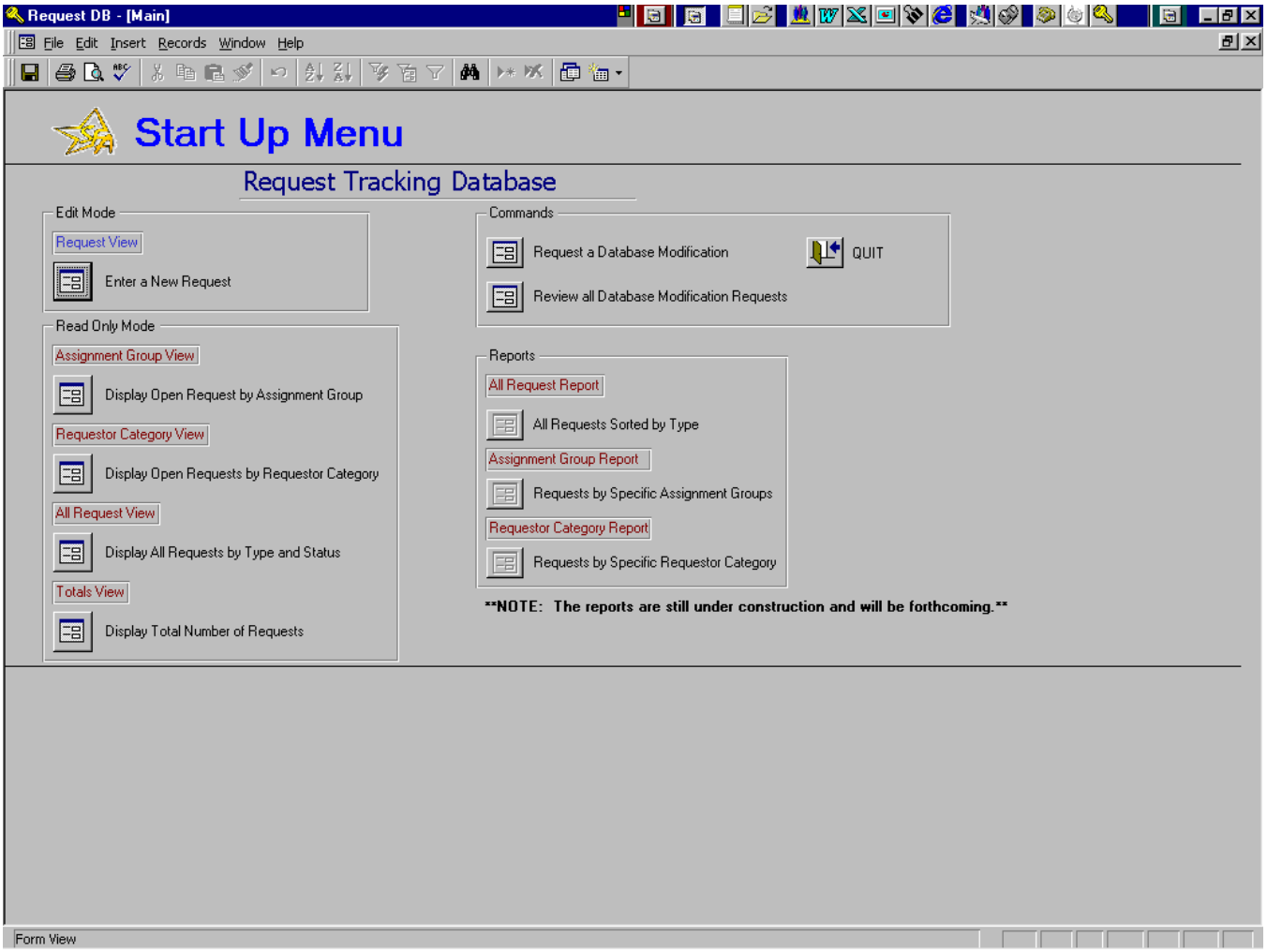
## 3.0 AM Request Tracking Database

The help desk software that best meets the needs of the AM group is a MS Access database designed specifically for Tier II AM help desks and customized for SFA. The AM Request Tracking Database, as it is called, has all the desired **functionality** (see requirements in Appendix A) for **day-one readiness** and an extremely **affordable lifecycle** cost. Also, since MS Access is a skill abundant within the AM group, the database can **continually improve** as the AM group evolves without having to contract external help.

## 3.1 Functionality

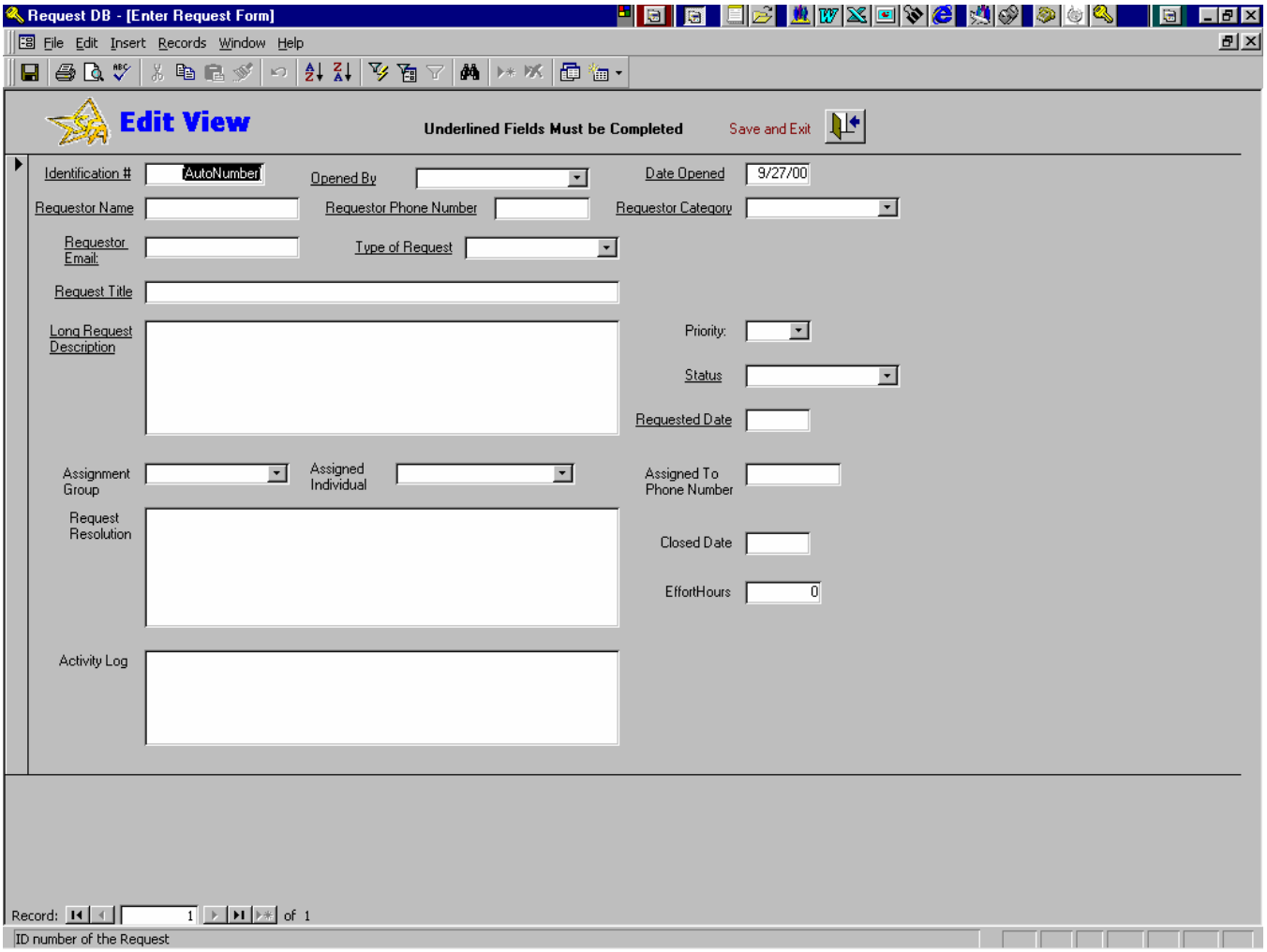
### 3.1.1 The Main Menu

The figure below is a screen shot of the database's main menu from which all functions of the tool can be accessed.



### 3.1.2 Request Creation

The figure below is a screen shot of the edit view – the main form of the database which captures all the information pertaining to a request.




### 3.1.3 The Database Record

Listed below are some of the fields (data) associated with a request record. Fields that are marked as "Required" need to be filled in when creating a new request. The rest of the fields are not required at the time of creating the record but each must be populated before the request can be set to a resolved status.

| Field | Explanation | Required Field? |
|---|---|---|

| | | |
|---|---|---|
| ID | Primary key – ID number of the request | YES |
| Date & Time Opened | Date request was made | YES |
| Opened By | The name of the person opening the record | YES |
| Requestor Name | The name of the person making the request | YES |
| Requestor Phone Number | The phone number of the person placing the request | YES |
| Requestor Email | The email address of the person placing the request | YES |
| Requestor Category | The Requestor's Business Unit or Group | YES |
| Title | Short identifier of request | YES |
| Request Description | Brief but comprehensive description of the request | YES |
| Status | Describes if the request is Open, Closed, or Canceled | YES |
| Requested Date | The date the requestor has asked for the request to be completed | YES |
| Priority | Priority of the request (1,2,3) | NO |
| Type of Request | Choose the type of request from the drop down list. Is it a New Initiative, Ad Hoc or Other request. | YES |
| Resolution | How the request was completed | NO |
| Effort Hours | How many hours did it take to complete the request | NO |
| Closed Date | Date that the request is closed | NO |
| Assignment Group | Group that has been assigned the request | NO |
| Assigned To | Individual that has been assigned to work the request | NO |
| Assigned To Phone Number | The phone number of the individual assigned to the request | NO |
| Assigned To Email | The email address of the person resolving the request | NO |
| Activity Log | Time-stamped record of activities | NO |

Table 1 Database Record

## 4.0 Known Limitations and Workarounds

In addition to the many benefits of using the Request Tracking Database, there are known limitations. Each limitation has been taken into account in the selection process and should have little impact in the short term, but each gives rise to a need for a medium or long term solution to be identified and implemented in the first three to six months of operation.

MS Access has a limit to the number of concurrent users (people accessing data at the same time) that it supports. Although stress testing of the database has yet to be completed, it is known that the database will support ten or less concurrent users before failure could occur.

AM Request Tracking Database is not currently linked to other help desk applications within the SFA environment. Through the ODBC standard protocol that MS Access uses, the capability exists to seamlessly transfer, report on and update information across applications should the AM group chose to incorporate it at any time. In the short term, the need for this kind of capability can be met with a manual hand off procedure via phone or e-mail.

## 5.0 Process Integration

The Request Tracking Database will integrate very well with the Request Management process group. This process group contains the processes associated with logging, validating, clarifying, classifying, controlling changes to, tracking, and closing requests for service. Across this process group, the Request Tracking Database will enable AM to track requests and continually keep users informed until a resolution is finalized.

Each Customer Care Representative will access the Request Tracking Database from a shared drive on the ED-LAN using a local copy of MS Access. In addition, each AM group member will have access to the database to receive and track all request based work assigned to him or her. It will be the responsibility of the Customer Care function to monitor and reprioritize requests and resources as appropriate to ensure that the work is completed in compliance with defined service levels.

A more detailed explanation of the processes and how the tool will be used is provided in 35.1.3 Applications Operation Processes. More specifically, the following are related documents that can be referred to for additional information on how the help desk software will be used to manage requests within the AM group:

| Document | Description |
|---|---|
| 1.1ServeUsersv0.x.doc | The process definition document for the Request Management Process Group. |
| 2.1GenerateReportsv0.x.doc | The process definition document for creating and disbursing service reports. |

# Appendix A – Tool Selection Requirements

## 1.0 Purpose

The purpose of this Appendix is to describe the requirements that were used in the selection processes for identifying the most suitable request management software.

## 2.0 Introduction

### 2.1 General

The Request Management Tool will be used to collect all of the incoming requests to the help desk and allow for the tracking of each request until resolution.

### 2.2 The Request Record

A request record should consist of the following fields (data).

| Field Name | Field Description |
|---|---|
| Request ID | Primary key - ID number of the request |
| Date And Time Opened | Date and Time request was made |
| Opened By | The name of the person opening the record |
| Requestor Name | The name of the person making the request |
| Requestor Phone Number | The phone number of the person placing the request |
| Requestor Email | The email address of the person placing the request |
| Requestor Category | The Requestor's Business Unit or Group |
| Title | Short identifier of request |
| Request Description | Brief but comprehensive description of the request |
| Status | Describes if the request is Open, Closed, or Canceled |
| Requested Date | The date the requestor has asked for the request to be completed |
| Priority | Priority of the request (1,2,3) |
| Type Of Request | Choose the type of request from the drop down list. Is it a Bug Fix, Enhancement/Update, Ad Hoc, or Query request? |
| Resolution | How the request was completed |
| Effort Hours (Estimated & Actual) | How many hours did it take to complete the request |
| Closed Date (Time) | Date that the request is closed |
| Assignment Group | Group that has been assigned the request |
| Assigned To | Individual that has been assigned to work the request |
| Assigned To Phone Number | The phone number of the individual assigned to the request |
| Assigned To Email | The email address of the person resolving the request |
| Activity Log | Time-stamped record of activities |
| Comments | Text area to store miscellaneous comments. |

Table 2 Request Record

## 3.0 Requirements

1. The Request Management Tool is in a graphical format that is easy to learn and use.
2. There should be a main menu for the user to navigate from. Menu options include: Create New Request Entry; Retrieve Request; View/Print Request Report.
3. There should be a "Help" function for the user to reference how the tool works.
4. The Request Management Tool will be accessed with an Andersen laptop/desktop PC.
5. The Request Management Tool will be capable of generating the numbers needed to populate the monthly Service Report (see 34.1.5 Metrics Based Service Targets for high level specifications).

## 4.0 Assumptions

1. Scalability: It is not yet known if and how this tool will need to communicate with other request management tools from the other applications. No connectivity to other help desks is needed in the short term (3-6 months).
2. Cost: There has been no cost allocated to the Request Management Tool. The goal is to keep costs at a minimum. Costs include the implementation fees, training fees, and maintenance fees. In the event that the tool selected is one that is already in place for another application, then the costs would entail obtaining licenses of the tool for installation on individual machines, ensuring connectivity and training.
3. Reporting: The Request Management Tool should be able to export data to an Excel spreadsheet for the monthly Service Reporting process.

# Appendix B – Help Desk Software Comparison Matrix

| Tool Name: | Request Tracking Database (MS Access ) | IFAPS Call Center Tool (Lotus Notes) | Advanced Helpdesk (AHD) | Siebel | Remedy |
|---|---|---|---|---|---|
| **Description** | MS Access is a readily available application and is used to run the database. This database will be able to track all incoming requests, as well as their resolutions. | Lotus Notes is part of a database management suite. This is an easy to use database format, and is currently being used by Colleen Kennedy | AHD is a fully Web-enabled enterprise support solution that enables corporate customers to help reduce support costs, improve service levels, and boost productivity of both technical staffs and end users. | Siebel provides a comprehensive family of front office solutions with functionality in every category of sales marketing and customer service market segments. | Remedy is recommended as a preferred tool for problem management, change management, service management, asset management, and configuration management. |
| | | | | | |
| **Cost** | | | | | |
| Initial Cost | $0 | $0 | ~$3k per license | $1350 per user | $20K server + five user pack. Additional five user packs for $3K |
| Lifecycle Cost | minimal | moderate | minimal | Maintenance charges based on licenses. | Maintenance charges based on licenses. |
| | | | | | |
| **Day One Readiness** | | | | | |
| Availability | Y | Y | Y | N | N |
| Customization | 4 hours | 80 + hours | moderate | Extensive | Extensive |
| | | | | | |
| **Functionality** | | | | | |
| **Field Requirements:** | | | | | |
| ID | Y | Y | Y | Y | Y |
| Date Opened | Y | Y | Y | Y | Y |
| Opened By | Y | Y | Y | Y | Y |
| Requestor Name | Y | Y | Y | Y | Y |
| Requestor Phone Number | Y | N | Y | Y | Y |
| Requestor Email | Y | N | Y | Y | Y |
| Requestor Category | Y | N | Y | Y | Y |
| Title | Y | Y | Y | Y | Y |
| Request Description | Y | Y | Y | Y | Y |
| Status | Y | Y | Y | Y | Y |

| | | | | | |
|---|---|---|---|---|---|
| Requested Date | Y | Y | Y | Y | Y |
| Priority | Y | Y | Y | Y | Y |
| Type of Request | Y | N | Y | Y | Y |
| Resolution | Y | Y | Y | Y | Y |
| Effort Hours | Y | N | Y | Y | Y |
| Closed Date | Y | Y | Y | Y | Y |
| Assignment Group | Y | N | Y | Y | Y |
| Assigned Individual | Y | Y | Y | Y | Y |
| Assigned To Phone Number | Y | Y | Y | Y | Y |
| Assigned to Email | Y | Y | Y | Y | Y |
| Activity Log | Y | Y | Y | Y | Y |
| | | | | | |
| **Improbability:** | | | | | |
| Team Member(s) knowledgeable of platform (enhancement purposes) | Y | N | N | N | N |
| Custom reporting capabilities | Y | Y | Y | Y | Y |
| Connectivity (If required at a later time) | ODBC | Lotus Notes | ODBC | Yes | Yes |